European Research Studies Journal
Volume XXI, Issue 4, 2018

pp. 343-355

Comparative Analysis of the Competitiveness of Food Markets: The Case of Kazakhstan, Russia, France and Belarus

A.Rasulova[1], S. Bolatkyzy[2], R. Elshibaev[3], A. Raiymbekova[4], D. Tursynbayeva[5]

Abstract:

The purpose of this article is to identify the reasons for the competitiveness of products, namely butter, manufactured in France, Belarus and Russia, and their wide use in the Kazakhstani market for 2011-2016, by comparing the food industry and the agricultural sector.

The main problem of import substitution in Kazakhstan is the non-competitiveness of domestic industrial enterprises, which shows that they do not pay attention to product quality.

Research questions are: Why do consumers in Kazakhstan prefer imported butter? What are the main criteria for this choice? Why are butter manufacturers in Kazakhstan not competitive?

The study is aimed at performing the analysis of literarure review of butter production in Russia, Belarus, Kazakhstan and France, as well as identifying what aspects of the quality, import and competition of butter are discussed in Kazakhstan, Belarus, Russia and France.

Keywords: *Butter market, competiveness, food industry, Kazakhstan, Russia, France, Belarus.*

JEL Codes: *L66, Q18.*

[1]*Narxoz Univesrity, Almaty, Kazakhstan, e-mail: asemras@list.ru*
[2]*Narxoz Univesrity, Almaty, Kazakhstan, e-mail: saltab@mail.ru*
[3]*Narxoz Univesrity, Almaty, Kazakhstan, e-mail: rakymzhan.elshibaev@narxoz.kz*
[4]*Non-governmental Educational Institution "Bolashak" University, Kyzylorda, Kazakhstan, e-mail: Aiman_1969@mail.ru*
[5]*Institute of Economics of the Science Committee of the Ministry of Education and Science, Astana, Kazakhstan, e-mail: dana_74@mail.ru*

1. Introduction

The import substitution of Kazakhstan's food industry is one of the priorities for the state, a special type of economic strategy and industrial policy. It is aimed at protecting the domestic producer and providing the country's population with all the necessary consumer goods, food and agricultural raw materials by replacing imported goods with domestic goods (Grabowski, 1994). This general idea of import substitution must be supplemented with the following circumstances, such as the competitiveness of the enterprise. The competitiveness of the enterprise contributes to the development of domestic goods for import substitution (Goretov *et al.,* 2015; Zaman and Meunier, 2017; Zobov *et al.,* 2017). The problems of import substitution of Kazakh industrial enterprises are connected with their non-competitiveness. For this reason, we distinguish three areas.

In the first direction, we would like to review the experience of Russia. The experience of foreign countries, according to Mironova (2015), shows that East Asian countries achieved the greatest success in implementing the policy of import substitution. They relied on a combination of import-based protectionism with commodity and geographical diversification of exports.

Ensuring the security of food supply through import substitution in the era of globalization of national agricultural markets is possible in macroeconomic conditions conducive to the development of the agricultural sector in Europe. The main reason that impedes its development is an unfair intersectoral exchange in the process of sacrificing the agricultural industry (Altukhov *et al.,* 2015).

Enterprises that relied on state support measures did not become competitive, and national governments that encouraged protectionism nurtured entire industries based not on real competitiveness, but on administrative resources (Rekolainen, 2016). As a result, the budgetary policy of these countries turned out ineffective, and import substitution led to a decrease in the competitiveness of national industries.

As foreign experience shows, the strategy of import substitution in the country can take a negative character. For this reason, we believe that state support is very important for the development of domestic enterprises. Kazakh and Russian scientists raise the issue of the importance of import substitution in the state and the importance of the state in supporting import substitution in the country.

In the second direction, a deliberate import substitution policy should increase the competitiveness of domestic products by stimulating technological modernization of production, increasing its efficiency and developing new competitive products with relatively high added value (Pronina *et al.,* 2014). Import substitution is possible only in competitive enterprises offering high-quality products at market prices.

Competitiveness is the main condition for the functioning of not only enterprises. Special attention in economics also deserves an analysis of competitiveness by level (Piwowar, 2012). The competitiveness of an industrial enterprise can be viewed as the ability to organize activities with the full use of potential opportunities aimed at improving production efficiency. This determines the ability in a certain period to compete with other enterprises in the industry market with an acceptable risk and satisfy consumers with supplied goods and services (Asylbekova, 2013).

It is also necessary to define quality management methods used by companies. The results of the individual steps were compared to conclusions about the actual impact of customer satisfaction on product quality, the impact of quality management on product quality and the impact of customer satisfaction and quality management on company performance (Suchanek *et al.,* 2017). In today's market, the main source of competitive advantage is the ability of enterprises to develop and implement new or significantly improved products and processes (Piwowar, 2015).

One of the main problems in the agro-food sector is the insufficient size of transformation and marketing (86.7% of the company with less than 10 employees). It also determines strategic opportunities for competitiveness, limiting their potential productive and technological innovation (Corchuelo and Mesías, 2017).

The third direction is aimed at identifying the problems of noncompetitiveness of the enterprise. Aitzhanova and Aitzhanova (2007) believe that companies need to actively stimulate the growth of demand for additional services in order to increase profits and competitiveness. To overcome the low value of additional services and increase the level of their attractiveness, it is necessary to pay attention to the quality of products at the proper level. In France, the decision to compete in industrial enterprises is addressed through the regulation of the European Union (EU) in relation to quality food products that supports competitiveness in the agricultural sector (Bontemps *et al.,* 2012). This paper examines the impact of this policy on cheese firms for 1990-2006 in France, showing that it reduces the risk for small firms. However, small firms still have a lower survival rate compared to larger ones, which cannot be compensated for by the quality effect of the label. In line with the consistent reforms, the EU is gradually eliminating price support in favor of non-distorting measures that are separated from production. The EU is also developing a quality policy to meet the interests of consumers with regard to food characteristics such as quality and geographical characteristics (Marette and Crespi, 2005).

2. Research Methods Sample and Data Collection

The food industry, as part of the agribusiness sector, is one of the most important elements of the economy. Key problems in butter production are the lack of quality raw milk and high competition from manufacturers of dried milk. More than 80% of the milk produced in Kazakhstan is from personal part-time farms: an unstable source of raw materials for dairies and enterprises, which requires regular

inspections. To obtain the reasons for using non-quality raw materials for butter production in Kazakhstan, a correlation was made through the R-program.
Data on variables were taken from the data of the Committee of Statistics of Kazakhstan, where: Y - income from sales of products, X1 - total volume of oil production, ton; X2 - processed liquid milk, ton; X3 - import of milk powder, ton; X4 - livestock of large cattle, thousand head; X5 - annual average productivity of one milking, kg; X6 - total domestic production of agriculture, tg.; X7 - import of butter; X8 - the area of grass crops, thousand ha.

lm (formula = y ~ . - X1, data = butter)

Residuals:

Min	1Q	Median	3Q	Max
-135277	-79563	-7098	69030	133478

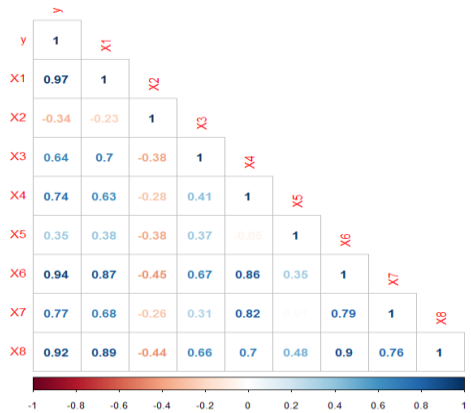
Coefficients:

	Estimate	Std. Error	t value	Pr(>|t|)	
(Intercept)	1.209e+06	9.767e+05	1.238	0.24691	
X2	8.755e+01	7.152e+01	1.224	0.25199	
X3	-7.009e+00	6.618e+00	-1.059	0.31717	
X4	-5.861e+03	2.804e+03	-2.090	0.06619	.
X5	-6.298e+02	3.812e+02	-1.652	0.13289	
X6	2.495e+01	7.403e+00	3.370	0.00825	**
X7	-1.764e+01	3.800e+01	-0.464	0.65360	
X8	5.950e+03	3.168e+03	1.878	0.09310	.

Signif. codes: 0 ‘***’ 0.001 ‘**’ 0.01 ‘*’ 0.05 ‘.’ 0.1 ‘ ’ 1

Residual standard error: 121000 on 9 degrees of freedom; Multiple R-squared: 0.9434; Adjusted R-squared: 0.8994; F-statistic: 21.43 on 7 and 9 DF; p-value: 6.281e-05.

Figure 1. *Calculations of the variables*



Based on the results of the study, a strong relationship was found between the variables X1 and X3. X1 - the total volume of oil production, it depends on economic income on sales revenue. X3 - import of dried milk. In the course of the study, it was found out that for the production of butter of Kazakhstan, manufacturers use not natural milk, but imported dry milk. For this reason, the quality of butter is inferior to the imported producer.

For the purposes of the study, an analysis of the text on the R program was used. It was taken from scientific articles from four countries. Texts were taken where three key words were displayed, which can reveal the problems of the issue: import, competitiveness, quality.

According to these keywords, we wanted to determine what words most words are used by domestic producers and producers of importing countries. Over one hundred articles were taken from each country. It turned out that the words related to the quality of butter are used more in the articles of France and Belarus, that is, the emphasis is placed on the quality of the products. In Kazakhstan and Russia they write more about imported products and competitiveness of butter.

3. Research Model and Hypotheses

To date, Kazakhstan's food industry is gaining momentum. But there are still import producers, exporting domestic producers from the food industry market. Many consumers choose import manufacturers. The reason is that domestic manufacturers can use non-natural raw materials, which affects the quality of butter. In this study we will define criteria for choosing products, namely butter of the foreign producer.

Table 1. *Dairy products obtained from milk, 2014 (1000 tons)*

№	Country	Drinking milk	Cream for direct consumption	Milk powder	Butter	Cheese
1	EU-28	30 433	2 670	2 516	1 787	9 160
2	Belgium	718	219	200	30	85
3	Germany	:	567	580	441	1 893
4	Estonia	91	27	6	4	41
5	Spain	3 521	142	30	:	388
6	France	3 535	417	528	365	1 949
7	Italy	2 548	131	:	100	1 176
Source: *http://ec.europa.eu/eurostat*						

Data sources and data availability in France. Statistics of milk and dairy products are collected in accordance with Decision 97/80/EC, in accordance with Directive 96/16/EC. They cover statistics on the production and use of milk by dairy farms, as well as statistics on the collection, use and use of milk by dairy enterprises. In addition to these annual statistics, monthly collections of cow's milk and triennial data on the structure of dairy products are provided by Member States.

Table 2. *Production of butter, 1 000 t (2011-2016)*

	geo\time	2011	2012	2013	2014	2015	2016
1	Belgium	59,77	58,97	36,31	44,59	48,96	58,17
2	Germany	475,69	489,62	473,1	482,42	509,49	506,93
3	Estonia	6,53	4,04	3,51	4,54	5,1	5,14
4	Spain	42,1	36,72	35,5	39,76	42,51	45,54
5	France	431,33	417,2	400,98	444,13	444,01	434,23
6	Italy	102,42	100,97	98,36	100,51	95,91	95,4
Source: *http://ec.europa.eu/eurostat*							

Due to the constantly decreasing number of dairy enterprises, national data are often subject to statistical confidentiality. Thus, the provision of EU outcomes in this context is a problem and the information presented in the analysis may be based on data not available with the usual accuracy, so that the published data can not disclose confidential values. Each exception is clearly indicated under the tables and figures. On the one hand, statistics from these few enterprises give early estimates of trends. On the other hand, a full review of the dairy sector requires detailed information from the farms, which means that final data on milk production is available only at the EU level about one year after the reporting year. According to Table 2, France is the second largest producer of butter. If in 2011 the volume of production amounted to 431 thousand kg, then in 2012 it decreased by 14 thousand kg. And the following year there is a decrease in productivity. This may be due to a decrease in the amount of milk. In the following years, the volume of butter is growing until 2016.

4. Results and Discussion

Based on the calculations, a total of more than 100 articles on tangential butter were considered. According to the research carried out using the method of "quantitative analysis of the text," one can note that different countries have different concepts of quality output. Unfortunately, we can assume that countries, where great importance is attached to "competitiveness" and "import", use non-natural raw materials. For this reason, many consumers choose products of the imported manufacturer.

4.1 Production of milk and dairy products in Belarus, Kazakhstan, Russia

On the EAEC territory, almost half of milk production is concentrated in personal subsidiary plots of the population. The largest presence of private farms is registered in Kazakhstan - 80%, Russia - 46%, whereas in Belarus 94% of milk is produced in agricultural organizations.

Regarding 2010, in general, according to the EES, there is a tendency to increase milk production in agricultural organizations and peasant (farm) households, on the farms of the population, production of milk, on the contrary, is declining.

Table 3. *Milk production in the EAEC member states by farm category, thous. tons*

№	(according to national statistical agencies)	2011	2012	2013	2014	2015	2016	2016 in % to 2011
	ALL CATEGORIES OF FARMS							
1	EAEU - total, including:	45 813,9	45 338,1	45 374,3	44 157,0	44 707,6	45 236,1	98,7
2	Belarus	6 624,6	6 500,4	6 766,3	6 632,7	6 702,9	7 047,1	106,4
3	Kazakhstan	5 381,2	5 232,5	4 851,6	4 930,3	5 067,9	5 182,4	96,3
4	Russian	31 847,3	31 645,6	31 755,8	30 528,8	30 790,9	30 796,9	96,7
	including: agricultural organizations							
1	EAEU - total, including:	20 244,7	20 416,1	21 131,7	20 404,2	20 874,9		
2	Belarus	5 731,4	5 819,0	6 163,2	6 119,9	6 245,6	6 637,8	115,8
3	Kazakhstan	181,4	185,4	200,7	222,0	244,6	265,8	146,5
4	Russian	14 313,2	14 395,0	14 752,4	14 046,5	14 364,9	14 717,9	102,8
peasant (farm) farm								
1	EAEU - total, including:	2 551,1	2 635,8	2 914,8	3 087,2	3 300,8		
2	Belarus	14,1	13,3	13,7	13,4	14,0	17,5	124,1
3	Kazakhstan	382,0	434,3	509,7	579,0	674,4	790,7	207,0
4	Russian	1 484,3	1 525,4	1 719,4	1 804,0	1 918,3	2 034,7	137,1
Note: *Consolidated forecast is formed on the basis of forecasts of supply and demand of milk and dairy products of country members.*								

The decline in milk production in Russia in 2011-2016 is caused by the reduction in the number of cows in all categories of farms-compared to January 1, 2012, it decreased by 435,000 head (5%) to 8,408 thousand heads as of January 1, 2017.

The fall in the gross milk yield in Kazakhstan is due to the reduction of the dairy herd in the households of the population where the main production is concentrated. In comparison with January 1, 2012, the number of cows in this category of farms decreased by 429 thousand head (18.8%) to 1,848.4 thousand heads as of January 1, 2017. At the same time, the dairy herd for this period increased by 248 thousand head (9%) due to an increase in the number of cows in agricultural enterprises and peasant (farm) farms - 1.9 and 2.6 times, respectively.

4.2 Internal consumption of milk, level of self-sufficiency

Domestic milk consumption in the EAEC is about 49 million tons per year. At present, the total volume of milk production does not allow to fully meet the domestic demand by own production - according to the estimation in 2016 the level of self-sufficiency was 93.5%.

The missing volumes in the domestic market are replenished by imported products. In 2016, imports of milk and dairy products in terms of milk amounted to 3,325 thousand tons (estimated). According to the draft consolidated forecast of the supply

and demand of milk and milk products of the member states of the EAGE (hereinafter - forecast), in 2017, the import is expected to decrease by 11.8% to 2,931 thousand tons, the demand for own production is forecast at 93.7 %.

Table 4. *Consolidated forecast of supply and demand for milk and milk products of the member states of the EAEC (extraction), thousand tons*

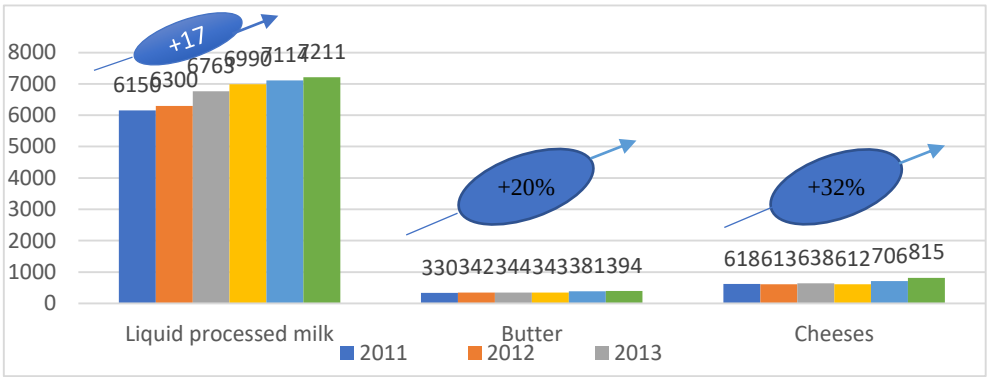
Project 2015	Report	2016	2017	2017 as % of 2016
Stocks at the beginning of the year-all, including:	2 671,3	3 123,1	2 829,4	90,6
Belarus	136,7	317,4	278,0	87,6
Kazakhstan	397,0	531,4	565,2	106,4
Russian	1 981,8	2 120,4	1 861,4	87,8
Production is everything, including:	44 707,6	45 220,2	45 636,0	100,9
Belarus	6 702,9	7 047,1	7 170,0	101,7
Kazakhstan	5 067,9	5 182,4	5 295,0	102,2
Russian	30 790,9	30 781,0	30 899,0	100,4
Mutual trade (import) -all, including:	4 263,9	4 975,9	5 006,1	100,6
Belarus	90,0	45,0	61,7	137,1
Kazakhstan	363,8	312,8	309,5	98,9
Russian	3 794,5	4 607,5	4 616,3	100,2
Foreign trade (import) -all, including:	4 974,2	3 325,2	2 931,2	88,2
Belarus	171,9	81,9	63,3	77,3
Kazakhstan	150,4	381,7	230,5	60,4
Russian	4 494,3	2 724,3	2 483,7	91,2
Internal use-all, including:	48 787,9	48 342,1	48 685,9	100,7
Belarus	2 896,6	2 670,8	2 642,3	98,9
Kazakhstan	5 408,3	5 737,5	5 891,0	102,7
Russian	39 312,2	37 769,8	37 909,5	100,4
Mutual trade (export) -all, including:	4 263,9	4 975,9	5 006,1	100,6
Belarus	3 834,4	4 510,7	4 514,6	100,1
Kazakhstan	35,9	80,6	89,0	110,4
Russian	325,4	243,7	259,4	106,4

Notes: *1. Consolidated forecast is based on forecasts of supply and demand of milk and dairy products of the Member States. 2. Data on mutual and foreign trade are given in terms of milk by conversion factors according to the Methodology for calculating joint forecasts of supply and demand of the Member States of the CU and EEA for the main types of agricultural products and food approved by the Recommendation of the ECE Collegium No. 24 of December 24, 2014.*

The greatest level of self-sufficiency in 2017 is planned in Belarus - 271%. In Kazakhstan it will amount to 89.9% (with regard to mutual trade (import) - 95.1%), in Russia - 81.5% (with regard to mutual trade (import) - 93.7%).

The production of the main types of dairy products in general for the EEA for the period 2011-2016 has a positive trend. In 2016, milk processed liquid was produced - 7,210.9 thousand tons, or 17.2% more than in 2010, butter - 393.9 thousand tons or 19.5%, cheese - 815.0 thousand tons or by 32%, respectively.

Figure 2. *Dynamics of production of the main types of dairy products in the EAES, thousand tons*



The growth in production was noted: for milk liquid processed - in Kazakhstan - 1.6 times, Belarus and Armenia - 1.5 times, in Kyrgyzstan - 18% and Russia - 9%; butter - in Russia - by 23%, Kazakhstan - by 22%, Belarus - by 15%; cheeses - in Kazakhstan - 1.9 times, Russia - 34%, Belarus - 24%. Butter production decreased in Kyrgyzstan (2 times), and cheese production decreased in Kyrgyzstan (by 6%).

Table 5. *Production of dairy products in the EEA member states, thousand tons*

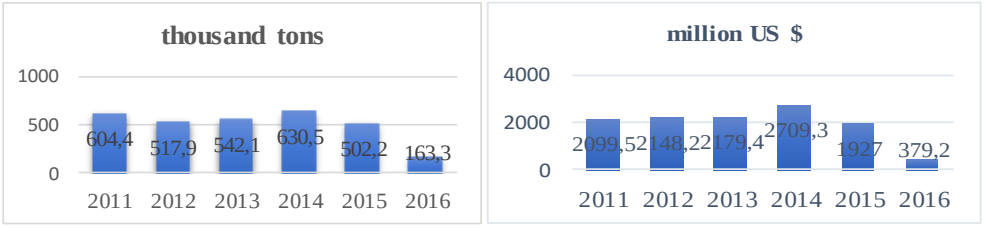
	2011	2012	2013	2014	2015	2016	2016 in % to 2011
Liquid processed milk – total, including	6150,2	6299,5	6763,2	6989,8	7113,6	7210,9	117,2
Belarus	584,4	699,0	790,4	780,2	831,8	886,6	151,7
Kazakhstan	295,0	338,5	372,5	440,3	472,9	466,7	158,2
Russian	4943,8	4926,4	5267,3	5385,6	5348,3	5377,9	108,8
Butter - total, including:	329,7	341,5	343,9	342,9	381,5	393,9	119,5
Belarus	98,6	104,3	112,9	99,2	106,7	113,6	115,2
Kazakhstan	14,0	14,6	12,2	14,1	18,8	17,1	122,1
Russian	211,9	219,8	216,0	227,1	252,7	260,6	123,0

Consumption of milk and milk products by the EEA population increased compared to 2011, except for Russia, where per capita consumption decreased by 3 kg to 244 kg at the recommended rational rate of 320-340 kg per year. In Belarus, in 2011, the consumption of dairy products increased by 6 kg and amounted to 253 kg per person per year. At the same time, despite the fact that per capita milk production is 1.9 times higher than the approved medical consumption rate (393 liters), per capita consumption of milk and dairy products in Belarus declines annually from 2012, due to the growth of consumer prices and a decrease in consumer demand. In Kazakhstan, consumption for the period 2011-2016 increased by 22 kg to 226 kg.

4.3 Import of dairy products

In 2015, 163.3 thousand tons of dairy products were imported to the EAEC territory for a total of $ 379.2 million. Regarding 2010, the import of dairy products decreased 3.7 times in natural and 5.5 times in value terms due to the introduction of the food embargo by Russia, the main importer among the EAUU countries.

Figure 3. *Dynamics of imports of dairy products by the EAUU in 2011-2016*



Due to the significant decrease in the volume of imports, the shares of the Member States in the total volume of supplies to the EAUU have changed. In 2016, Russia's share in the total volume of imports of dairy products of the EAUU in physical terms amounted to 39.5% against 90% in 2011, Belarus -36.4% against 1.7%, respectively.

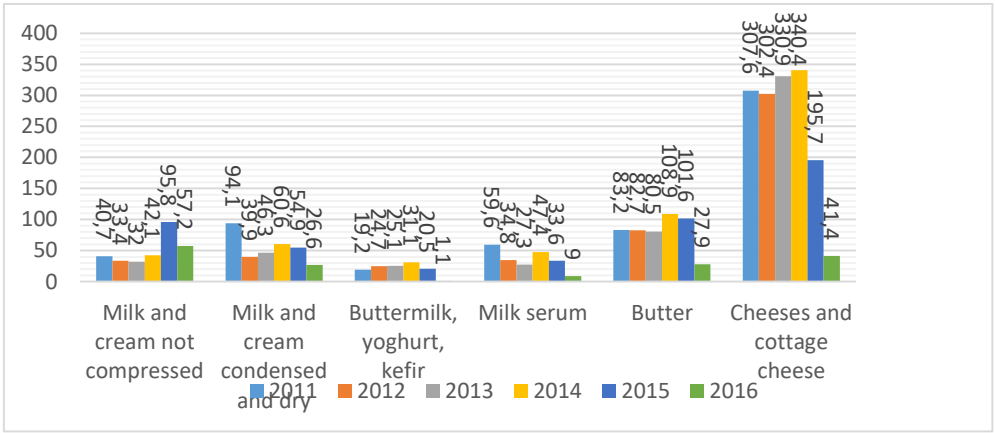
Table 6. *Shares of the EEA member states in total imports of dairy products for 2011-2016,% of physical volumes*

	2011	**2012**	**2013**	**2014**	**2015**	**2016**
EAUU	100,0	100,0	100,0	100,0	100,0	100,0
Belarus	1,7	0,4	0,1	0,8	17,0	36,4
Kazakhstan	6,8	5,6	5,5	4,6	6,9	16,9
Russian	89,9	92,0	92,3	92,6	73,5	39,5

Compared to 2011, imports declined in all types of dairy products, except for milk and cream (40.4% increase): buttermilk, yoghurt, kefir - 17.4 times, cheeses and cottage cheese – 7.4, whey - 6.6, milk and cream thickened and dry - 3.5, butter - 3.

At the same time, compared to 2010, Belarus' imports increased: milk and cream of uncontrolled - from 56 tons to 55.3 thousand tons, cheeses and cottage cheese - from 510 tons to 2.3 thousand tons, as well as buttermilk, yoghurt and kefir - from 0.4 tons to 170 tons, butter - from 1.7 tons to 12 tons. In Kazakhstan there is an increase in butter imports - 2.3 times to 3.4 thousand tons, whey - 1.9 times to 3.9 thousand tons, milk and cream condensed and dry - by 27.5% to 12.8 thousand tons; in Armenia - milk and cream of uncontrolled - 3.3 times to 0.35 thousand tons, milk and cream condensed and dry - 1.5 times to 3.2 thousand tons, butter - 1.5 times to 4,3 thousand tons, cheeses and cottage cheese - by 41,3% up to 0,8 thousand tons; for Kyrgyzstan - milk and cream condensed and dry - 1.9 times to 2.4 thousand tons.

Figure 4. *Dynamics of imports of certain types of dairy products in the EAES for 2011-2016, thousand tons*



5. Conclusions

The food industry plays a significant role in the development of agriculture and significantly influences the development of such related industries as electric power, transport, and the production of packaging materials. It is of key importance in shaping the social welfare of the population. Food industries, and there are about thirty of them, one of the main links in the structure of the agroindustrial complex, should ensure the sustainable supply of the population with the necessary food.

To increase the competitiveness of Kazakhstani enterprises by enhancing the efficiency of foreign economic activity, one should create a system for monitoring the competitiveness of products and services. It is necessary to create a centralized methodological base for the formation of targeted integrated programs that contain standards on the structure and content of the Agro Industrial Complex sections.

The main directions of the food industry development should be: 1) technological re-equipment of the industry; 2) creation of cluster structures for the production, processing and sale of agricultural products; 3) increase in the output of the end product of the agroindustrial complex in monetary terms per unit of agricultural raw materials; 4) development of agro-industrial integration in the form of financial and industrial groups, agrofirms and other forms of production, processing, storage and trade of agricultural products and food; 5) introduction of innovative technologies improving the yield of products; 6) creation of new domestic food products; 7) improvement of the quality of domestic products, introduction of international standards; 8) state support of domestic producers capable of producing such types of products which are currently imported. Kazakhstan's producers need to pay attention to the quality of raw materials for butter production, as in the market of Kazakhstan a large number of competitors and consumers choose high-quality products.

The study and collection of data and their analysis made it possible to realize the goals in this study and draw the following conclusions: 1. In the food industry enterprises surveyed, the role and quality of import, competitiveness, as the main factors affecting the development of enterprises, do not always play a leading role. 2. The most important process of enterprises' response was the intensification of market competition. The competitiveness of the product depends on the use of natural raw materials. 3. To develop the food industry and improve the competitiveness of the food industry, one should improve the quality of products.

The import penetration factor weakens Kazakhstan's competitiveness in the area under investigation, however, because of the free flow of products to the EU, this is inevitable. The analysis showed a high growth of France's competitiveness in the food industry, analyzed years. Kazakhstan has a rich source of raw materials for the food industry. But the majority of manufacturers of the dairy industry use in production not natural raw materials. This affects the quality of products. Since the competitiveness of products depends on this.

References:

Aitzhanova, D.A. and Aitzhanova, B.B. 2007. Perfection of the mechanism of increase of competitiveness of firm in conditions of integration of the world community. Almaty.

Asylbekova, N.T. 2013. Analysis of the competitiveness of the food industry of the Republic of Kazakhstan. International Journal of Experimental Education. Science and Education, 4(6), 144-150.

Bontemps, C., Bouamra-Mechemache, Z. and Simioni, M. 2012. Quality labels and firm survival: some first empirical evidence. European Review of Agricultural Economics, 40(3), 413-439. https://doi.org/10.1093/erae/jbs034

Corchuelo, B. and Mesías, F.J. 2017. Disposición a innovar y competitividad en la agroindustria extremeña. ITEA, 113(2), 176-191.

Goretov, I.N., Gumarova, F.Z. and Tsaregorodtsev, E.I. 2015. Management of Competitiveness of a Regional Agricultural Sector. Modern problems of science and education, 1(1).

Grabowski, R. 1994. Import substitution, export promotion and the state in economic development. The Journal of Developing Areas, 28 (4), 535-553.

Marette, S. and Crespi, J. M. 2003. Can quality certification lead to stable cartels? Review of Industrial Organization, 23, 43-64.

Mironova, O.A. 2015. Import substitution: international experience and lessons for Russia. International Research Journal, 7(38), 84-87.

Piwowar, A. 2012. Assessment of the social-economic development level of the chosen Lower Silesian districts. Peer-Reviewed Conference Proceedings of the International Conference Hradec Economics Days, Hradec Králové Jan 31–Feb 1, 153-158.

Piwowar, A. 2015. Innowacje w przemyśle chemicznym w Polsce. Aspekty teoretyczne i praktyczne. Przemysł Chemiczny, 94, 12–15.

Pronina, N.N., Oganezova, D.I. and Usenkova, O.V. 2015. The reality of import replacement in Russia. Bulletin of Penza State University, 3(11), 58–62.

Rekolainen, J. 2016. We have to get used to new normal. Newsletter International "Import Substitution", 5, 2-3.

Suchanek, P., Richter, J. and Kralova, M. 2017. Customer satisfaction with quality of products of food business. Prague economic papers, 26(1), 19-34.

Zaman, C., Meunier, B. 2017. A Decade of EU Membership: Evolution of Competitiveness in Romania. European Research Studies Journal, 20(2A), 224-236.

Zobov, M.A., Degtereva, A.E., Chernova, Yu.V., Starostin, S.V. 2017. Comparative Analysis of the Best Practices in the Economic Policy of Import Substitution. European Research Studies Journal, 20(2A), 507-520.